ePlan User Guide

Overview

The purpose of this document is to provide general information on the process for using the City of Minneapolis' electronic plan submission and review system called ePlan (also known as ProjectDox.)

Before applying for an application or permit, you should meet with City staff to identify which applications are required for your project.

Step 1: Submit application or permit

Step 2: Receive email from ProjectDox, create your account, and upload plans and documents into ePlan (ProjectDox)

Step 3: Review City comments and corrections in ePlan

Step 4: Resubmit plans and documents (if required)

Step 5: Download and print your approved set of plans

For reasonable accommodations or alternative formats please contact 311.People who are deaf or hard of hearing can use a relay service to call 311 at 612-673-3000. TTY users can call 612-673-2157 or 612-673-2626. Para asistencia 612-673-2700, Yog xav tau kev pab, hu 612-673-2800, Hadii aad Caawimaad u baahantahay 612-673-3500.

Step 1

Submit application or permit	Visit the Minneapolis Development Review Office on the 3rd floor of the Public Service Center Building to meet with City staff. Public Service Center Building 250 S. Fourth St., Room 300 Minneapolis, MN 55415 Phone: 612-673-3000 Fax: 612-370-1416 TTY: 612-673-3300 To view Service Center Hours, visit: http://wwwminneapolismn.gov/mdr/ During your meeting, staff will provide the information for the applications and permits needed to do your work. If you have the information you need to complete the applications, you can submit your applications on-site. If you do not have all of the information, staff will provide information about where you can send your completed applications. You can also email questions to Development@minneapolismn.gov.

Step 2

Receive email from ProjectDox, create your account, and upload plans and documents into ePlan (ProjectDox)	When the application(s) have been submitted and fees paid (if applicable), you will receive an email invitation with instructions to create a user account and upload your plans (see sample invitation on page 3). Follow the steps in the email to log in to ePlan (ProjectDox). A temporary password will be included in the new user email. Internet Explorer 11 is **required** for full functionality of ePlan. **Note: Only one person may be an applicant on a project. The applicant receiving the ePlan account will be the same person listed on the application.** The Minneapolis Development Review Center has computers available for you to upload plans. You will have to create your account before using these computers and will need to have your plans loaded on a zip drive/USB port for upload.

City of Minneapolis

Minneapolis ePlan Invitation Letter

Hello [Applicant],

Welcome to the City of Minneapolis' electronic plan review (ePlan) process. This Project invitation has been sent to you in response to your construction permit application. An EPD (Electronic Plan Review) has been created to allow you to electronically upload your drawings and associated documents for permit plan review.

Note: If this is your first time using the ProjectDox application, please disable your pop-up blocker. If you using Internet Explorer, on the login page, click on the **"Install ProjectDox Components"** link; this will install the Active X software components on your computer which are necessary for the application to function properly.

To access your new Electronic Plan Review project, follow the instructions below:

1. Very Important! **– Please review the Electronic Plan Review (ePlan) Submittal Requirements document** (http://www.ci.minneapolis.mn.us/www/groups/public/@regservices/documents/form/wcmsp-189625.pdf) in its entirety before starting the process. Failure to follow the appropriate submittal guidelines may result in delay or rejection of your permit!
2. Click the project access link: https://pdx.minneapolismn.gov/projectdox
3. Enter your login (email address) and temporary password provided in this email.
4. Set up your permanent login account for secured access to the system.
5. Clink on the Project link on the "Active Projects" page.
6. Click the "Drawings" folder.
7. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use the required naming conventions http://www.ci.minneapolis.mn.us/www/groups/public/@regservices/documents/form/wcmsp-189625.pdf.
8. Click the "Documents" folder.
9. Click the "Upload Files" button and follow the instructions to upload your drawings. Please ensure the files use required naming conventions http://www.ci.minneapolis.mn.us/www/groups/public/@regservices/documents/form/wcmsp-189625.pdf.

TO COMPLETE YOUR SUBMISSION TO THE CITY YOU MUST PERFORM THE FOLLOWING STEPS

10. Once all plans and any associated documents have been uploaded to the appropriate folder(s) while inside the project, click on the "Workflow Portals" button.
11. Click the "ApplicantUpload" link under the Task column.
12. Click "Ok" to accept the task.
13. An electronic form will display. Click on the "Submission Complete – Notify the City of Minneapolis" button to complete the submission of your plans and associated documents to the City of Minneapolis.

Supported file types: DWF or vector PDF

User Login	allen.hanson@minneapolismn.gov
Temporary Password	**994BE6B**
Project Permit #	**2764**
Plan Check Coordinator	**Administrator Temp**
Plan Check Coordinator's Email	support@avolvesoftware.com
Project Permit Access Link	

If you have any problems or questions, call Minneapolis 311 (612-673-3000) or email (Development@minneapolismn.gov) and we are happy to assist you.

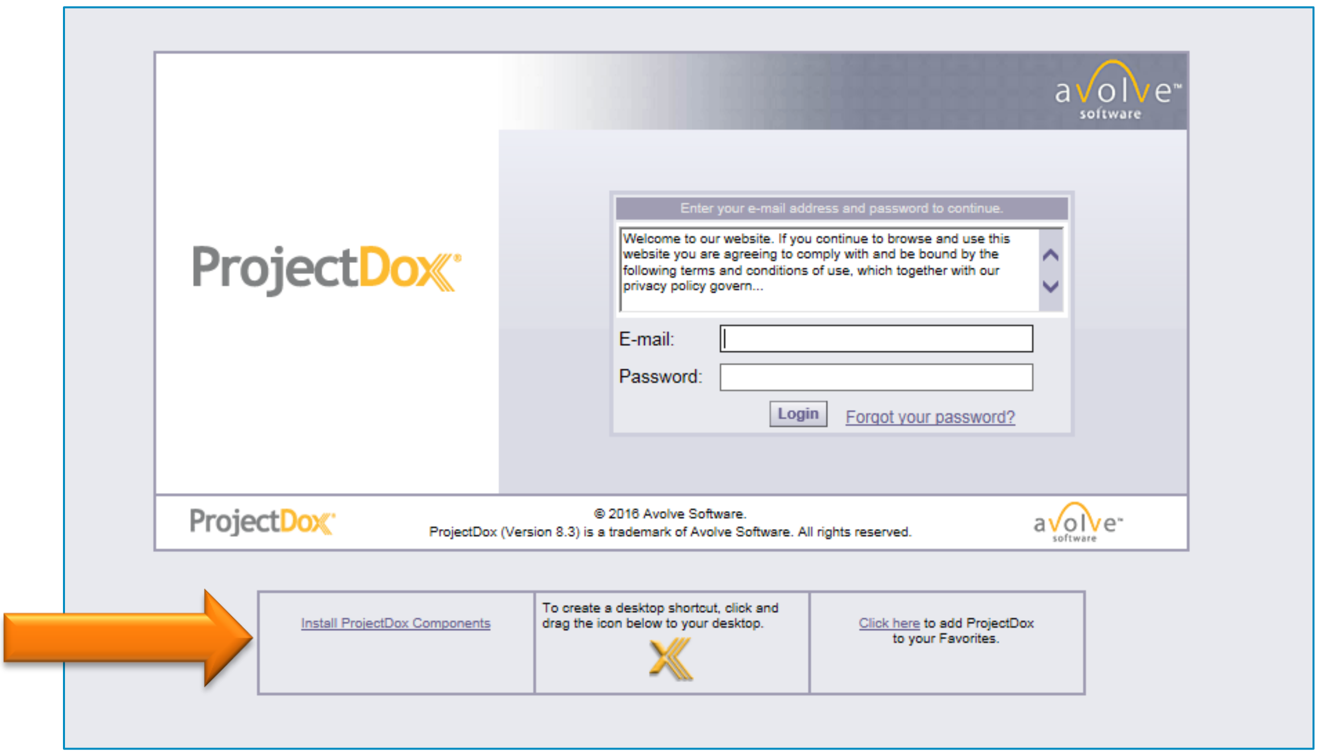
SAMPLE INVITATION EMAIL

LOGGING IN AND CREATING A NEW USER PROFILE

1. From the invitation, click on "**Login to ProjectDox**". This will open a web browser and take you directly to the login screen. You can also open a web browser and type https://pdx.minneapolismn.gov/projectdox/.
2. Check your computer to be sure you are using Internet Explorer 11 or higher by clicking on the gear at the top right top of a window and selecting "About Internet Explorer."

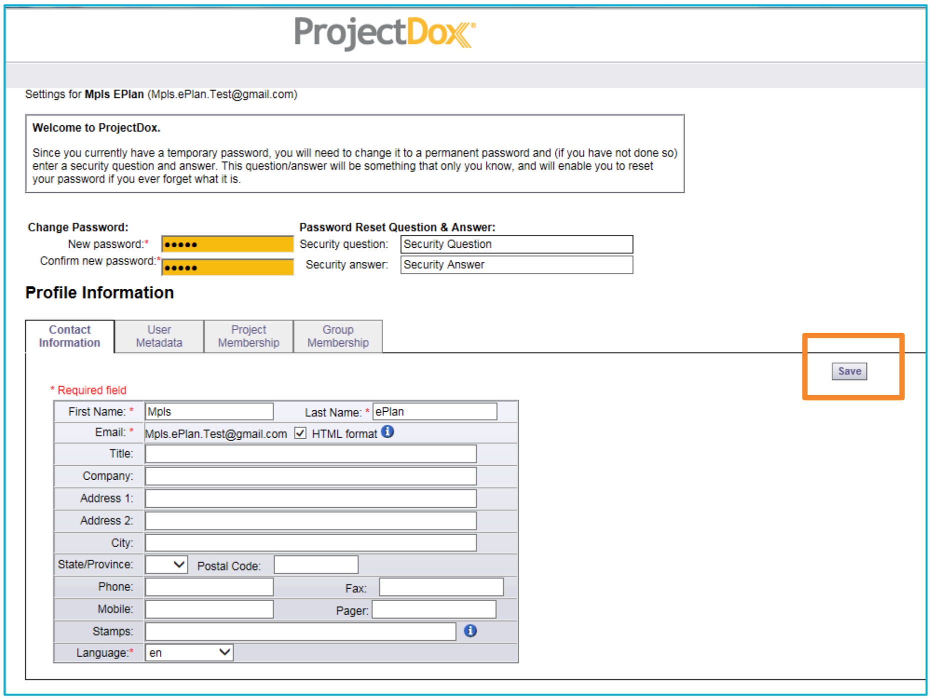
Note: Please ensure that the pop-up blocker is turned off and that you indicate that ProjectDox is a trusted site.

3. Click on "**Install ProjectDox Components"** at the bottom of the screen to install ProjectDox on your computer.



4. After ProjectDox components are installed, type or paste the temporary password from the email into the password field on this form and click "Login". **The password is case sensitive.**

5. Next you will be taken to your User Profile. You will need to: (1) reset your password, (2) create a security question and answer, and (3) enter additional information about yourself.



6. Fill in all of required fields and click "**Save**".

7. After logging in, you will be taken to your home page.

PREPARE YOUR PLANS:

Prepare your plans by following the guidelines below. These guidelines are critical to ensuring your review is completed in a timely manner.

Electronic Plan Review (ePlan) Submittal Guidelines

- 4-inch by 4-inch clear stamp area **in upper right corner** of ALL sheets
- Searchable vector PDFs or DWF drawing files
- One plan sheet per digital file
- Landscape orientation
- File name to identify discipline and match sheet index name and sort order
- Corrected sheets must be named exactly as the original sheet

Note: You will be required to install ProjectDox on your computer. Internet Explorer 11 is the required browser.

Plan sheet stamping area

All sheets must have a 4-inch by 4-inch clear area in the upper right corner of the sheet for the City of Minneapolis electronic approval stamp. **NOTE:** The approval stamp will cover any information placed in this area.

Plan sheet file format standards

Plans must be submitted in a searchable vector PDF format (non-scanned) or as a DWF file. Each plan sheet must be uploaded as a single file. Files must be landscape orientation, monochrome with white background and print ready. DWF files must be a current version of AutoCAD and cannot be 3D.

File Naming

Plan file names and sort order **must** match the sheet index. ePlan software sorts numeric to alpha. To ensure proper sorting, we require numbering the sheet before the name with 001, 002, 010, 011, 099, 100, etc. (Example: 001-Cover Sheet, 002-Survey, 003-A1.0-First Floor Plan, 004-A2.0-Framing Plan,…, 008-C1.0-Grading Plan, 009-S1.0- Foundation Detail, etc.)

Corrected or revised submissions must use the EXACT same file name as the original submittal to ensure proper versioning of your files and to help expedite the review process. The digital file name (e.g. A1.0) must match the plan sheet name to which it corresponds. If a new sheet needs to be inserted **between** sheets 010 and 011, it can be numbered 010A or 010.1.

Plan Sheet size

The following list indicates plan sheet sizes that can be submitted electronically. (See individual plan checklists for additional sizing requirements).

8 ½" x 11"	11" x 17"
12" x 18"	18" x 24"
24" x 36"	30" x 42"
36" x 48"	

Graphic scale

Each sheet must illustrate a typical graphic scale. If more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail. All plans must be drawn to scale.

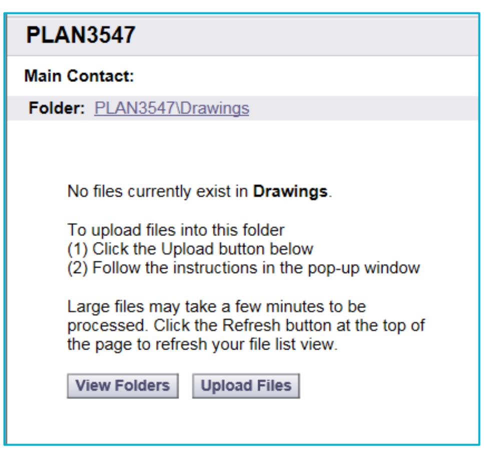
Uploading files

"DRAWINGS FOLDER"	Should contain plan sheet drawings
"DOCUMENTS FOLDER"	Should contain all calculations, photos, checklists and other supporting documents

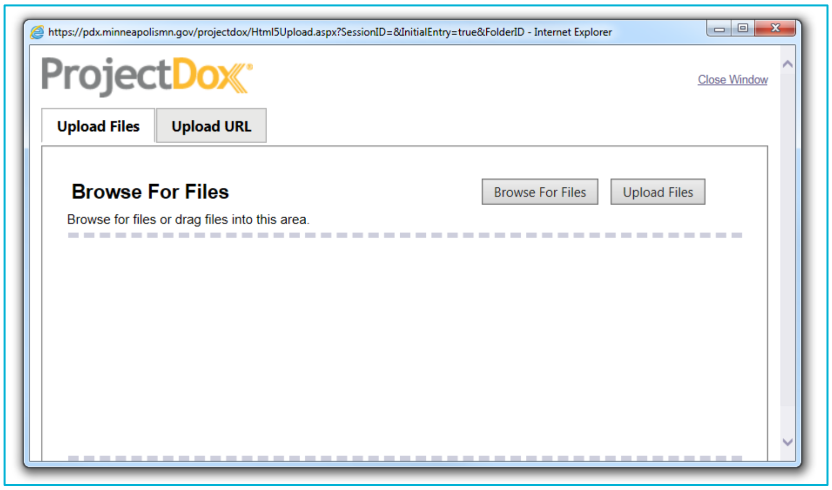
UPLOAD YOUR PLANS.

After you have successfully logged in to ePlan, you will see a list of your projects. **Note: If you do not see any projects listed, click the "All Projects" button.** Any outstanding tasks that require your action will be displayed in the Active Task List area below the project list. To upload your plans, follow the steps below.

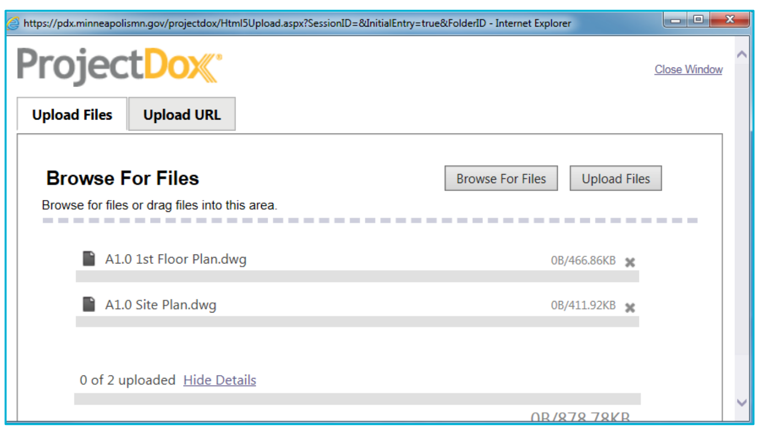
1. Click your **project number**. Find the **Documents** and **Drawings** folders to upload your documents. The plan reviewer will be able to see and review your plans in these folders after you complete the tasks. **Note: Not every user can see all of the folders shown on the screen.**
2. Select the **Drawings** or **Documents** folder depending on the file you are uploading. The **Drawings** folder should contain plan sheet drawings; each plan sheet is required to be a separate file.
3. The **Documents** folder should contain all calculations, photos, checklists and other supporting documentation for your project. Note: Applications, Calculations, Photos, Etc. must be uploaded and named as separate files into the Documents folder, but each individual file may contain several pages.
4. To add drawings, click on the **Drawings** folder on the left of your screen. If there are no drawings currently in the folder, you will see the pop-up below. **Note: This process is the same if you are loading Documents.**



5. Click the “**Upload Files”** button (next to View Folders). Note: You may need to refresh the screen if you do not see the Upload Files button. The Upload Files dialog will appear.
6. You will see the prompt to **Browse For Files** or **Upload Files**. You can either browse for files or drag files onto the screen to upload.

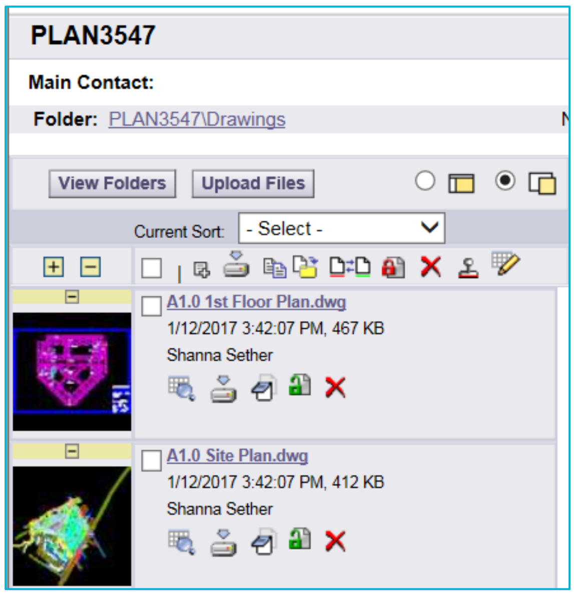


7. Click “**Open**” to add the file. You’ll be taken back to the Upload dialog box.
8. Large files will take a few minutes to load. When they are loading, you will see the screen below that shows your progress.

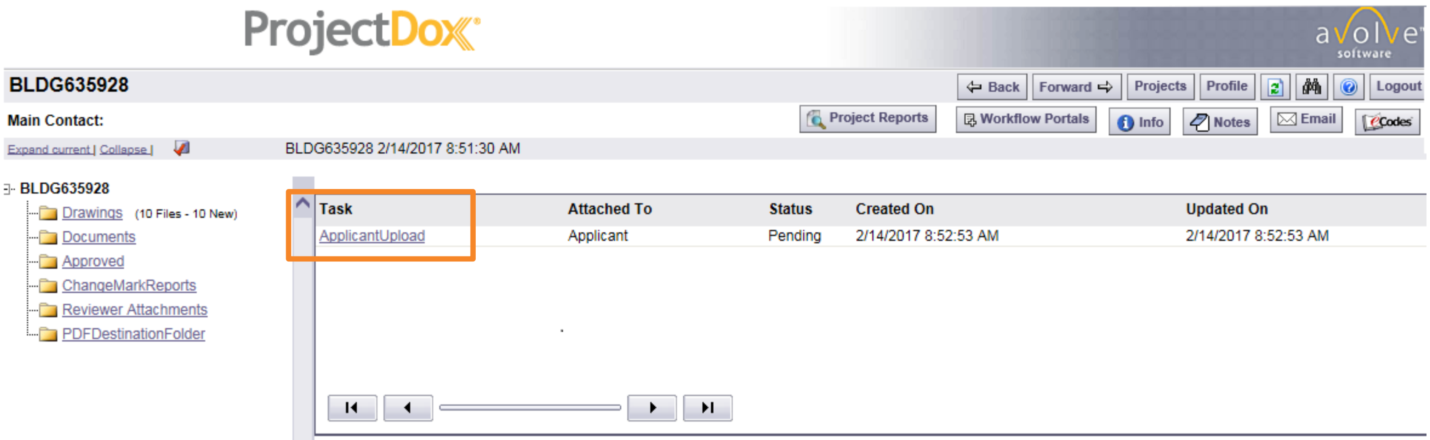


9. Click “**Upload Files**” to upload the files to the folder.

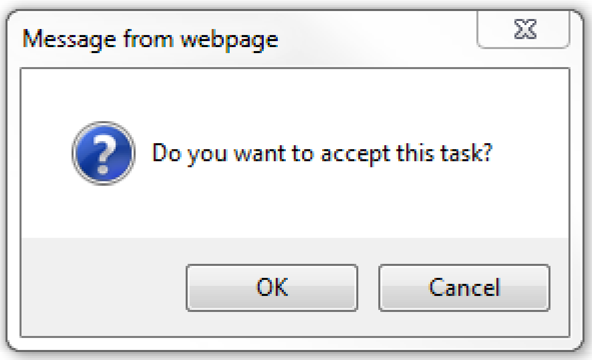
10. Once the files are uploaded to the folder(s), thumbnail images of all the files will be visible. Under each thumbnail, you can see the filename, upload date and time, file size information and name of the user who uploaded that file.



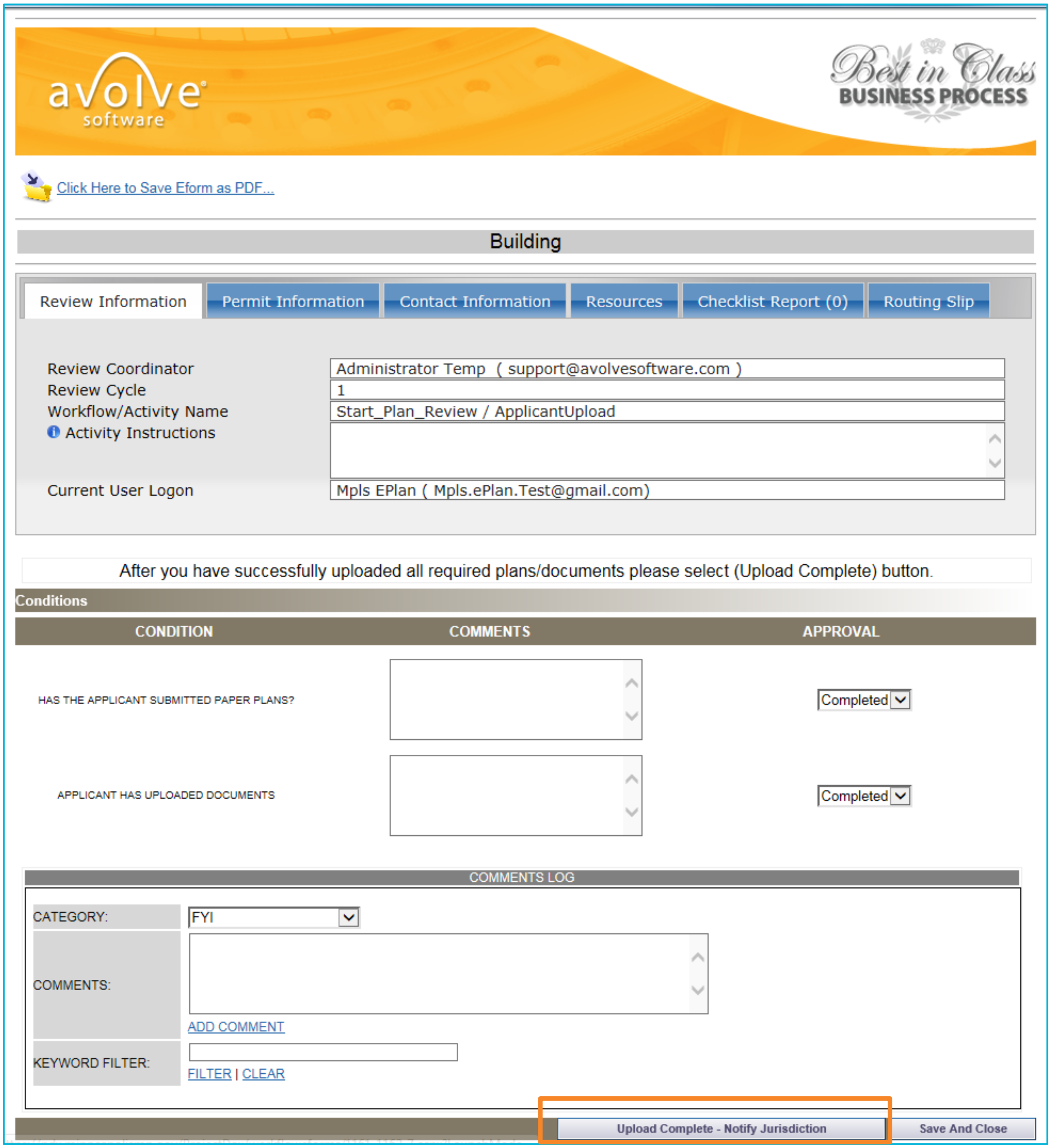
11. Click on the “**Workflow Portals**” button. The Applicant Upload task will display.



12. Click on the task name and a dialog box displays, "*Do you want to accept this task?*"



13. Click on **"OK"** to accept responsibility for completing the task. The eForm window will appear. When finished with uploading, go back to the eForm window. At the bottom of the page, select the **Upload Complete – Notify Jurisdiction** option. This will complete the Applicant Upload task.



avolve software

Best in Class BUSINESS PROCESS

Click Here to Save Eform as PDF...

Building

Review Information | Permit Information | Contact Information | Resources | Checklist Report (0) | Routing Slip

Review Coordinator	Administrator Temp (support@avolvesoftware.com)
Review Cycle	1
Workflow/Activity Name	Start_Plan_Review / ApplicantUpload
Activity Instructions	
Current User Logon	Mpls EPlan (Mpls.ePlan.Test@gmail.com)

After you have successfully uploaded all required plans/documents please select (Upload Complete) button.

Conditions

CONDITION	COMMENTS	APPROVAL
HAS THE APPLICANT SUBMITTED PAPER PLANS?		Completed
APPLICANT HAS UPLOADED DOCUMENTS		Completed

COMMENTS LOG

CATEGORY:	FYI
COMMENTS:	ADD COMMENT
KEYWORD FILTER:	FILTER | CLEAR

Upload Complete - Notify Jurisdiction | Save And Close

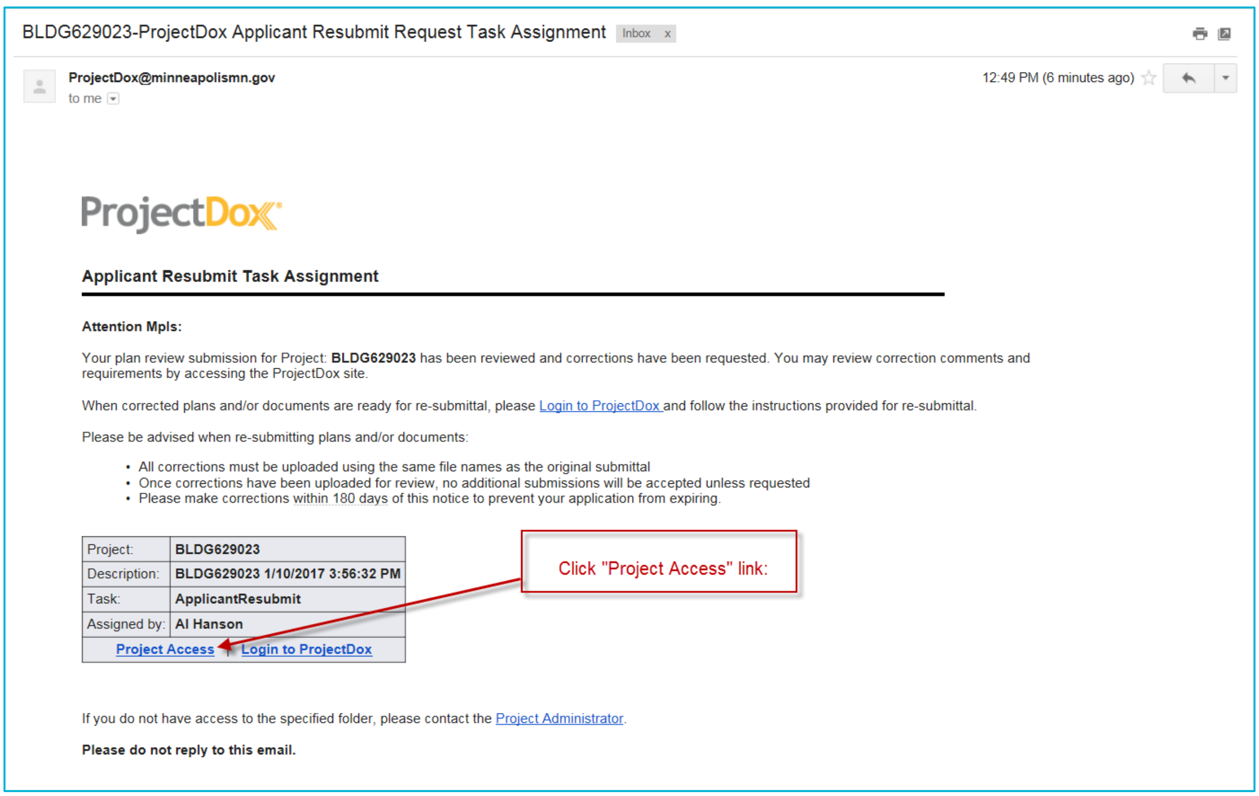
Steps 3 & 4

Review City comments and corrections via ePlan and resubmit plans and documents (if required)

After you have submitted your plans, City staff will review them. When no additional information or corrections are required from you, the submission will be routed to the departments for the formal review process.

If items are missing or corrections are required, an email will be sent to you with instructions on how to resubmit. You will be able to view Staff comments in ePlan (see Step 5 to learn how to resubmit plans).

SAMPLE REVIEW CORRECTIONS EMAIL



BLDG629023-ProjectDox Applicant Resubmit Request Task Assignment Inbox x

ProjectDox@minneapolismn.gov
to me

12:49 PM (6 minutes ago)

ProjectDox

Applicant Resubmit Task Assignment

Attention Mpls:

Your plan review submission for Project: **BLDG629023** has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please Login to ProjectDox and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	**BLDG629023**
Description:	**BLDG629023 1/10/2017 3:56:32 PM**
Task:	**ApplicantResubmit**
Assigned by:	**Al Hanson**
Project Access	Login to ProjectDox

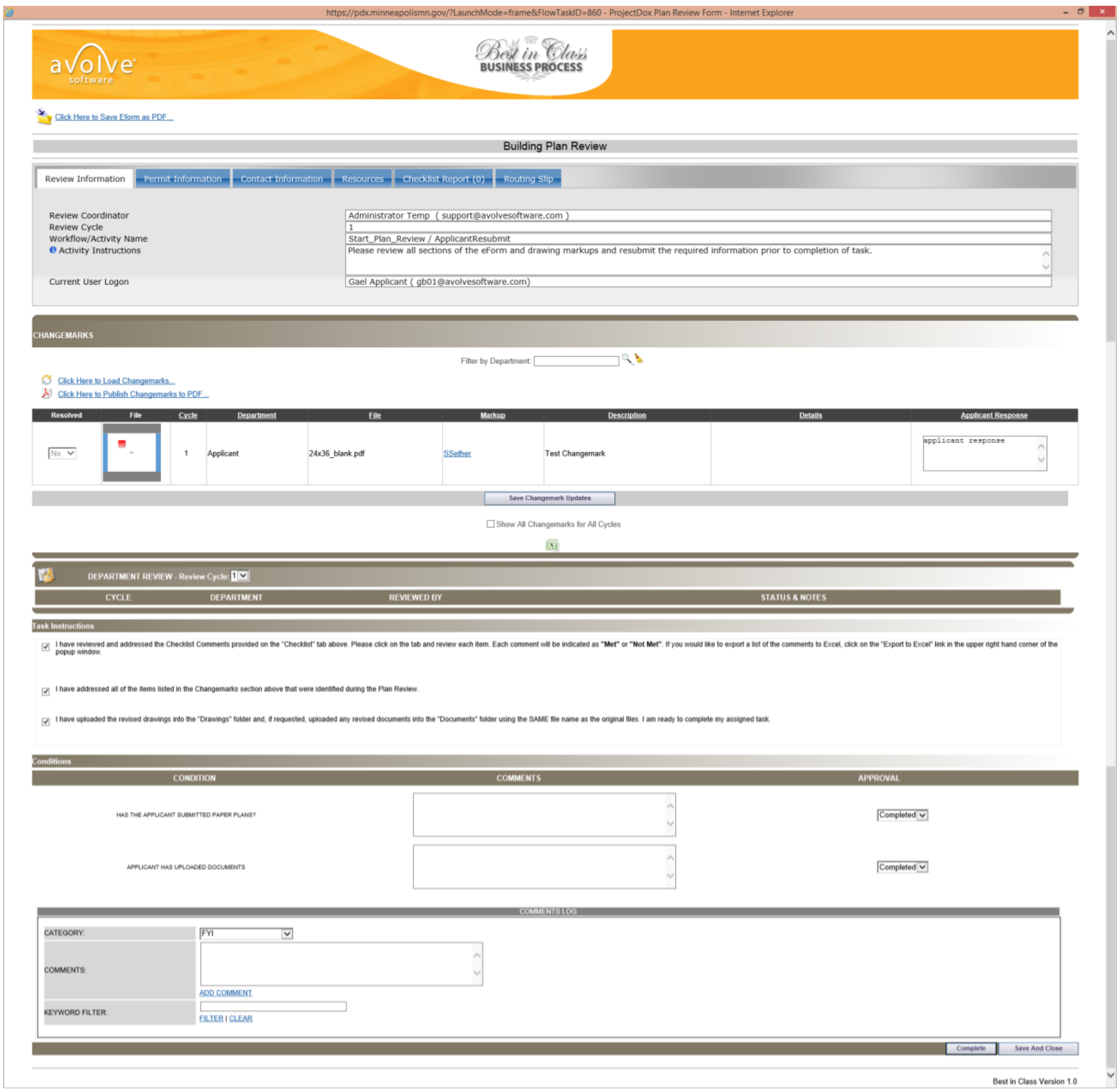
Click "Project Access" link:

If you do not have access to the specified folder, please contact the Project Administrator.

Please do not reply to this email.

If one or more reviewers requests new or additional information during the review process, you will receive an email notification of the resubmit task assigned to you and a task added to your task list. Follow these steps to review required changes:

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit** link from the Task List shown under the column heading of **Task**.
3. A dialog box displays, ***Do you want to accept this task***? Select OK.
4. A Resubmit eForm will pop-up:



5. Review the following:

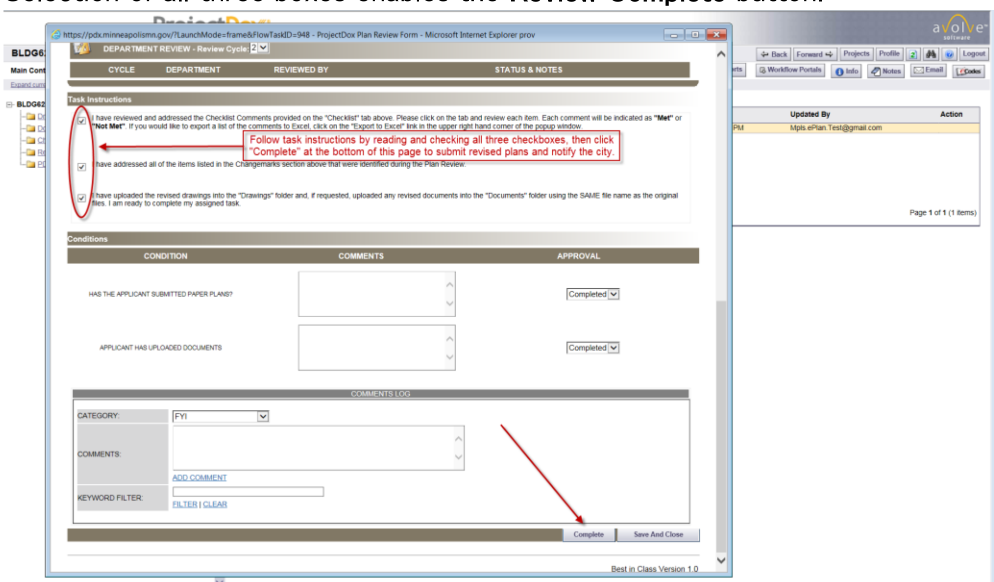
   – View checklist items on the checklist tab

   – View markups provided in the Changemark Section

   – View comments provided by the plan reviewers and provide responses as required.

6. Make required corrections and upload the revised files to the same folders **using the same naming convention as the original file.** Note: Corrected or revised submissions must use the EXACT same file name as the original submittal to ensure proper versioning of your files and to help expedite the review process.

7. In the Task Instructions section, select the check boxes to indicate the items have been completed. Selection of all three boxes enables the **Review Complete** button.



8. Select the "**Review Complete**" button.

9. Click "**OK**" on the dialog message to complete the task, close the eForm.

10. Click "Cancel" to remain on the current view.

A notification will be sent to City staff. They will confirm that plans have been uploaded and the proper departments are selected for assignment for the next review cycle. If any of the departments rejects the review, the **Applicant Resubmit** step will be repeated until all the departments approve.

If all reviews have been approved by all required departments, City staff will apply the City of Minneapolis approval stamp and assign final permit fees, if applicable. You will not be able to see the approved, stamped plans until all permit fees are paid.

Step 5	
Download and print your approved set of plans	Congratulations! The City of Minneapolis has approved your plans. You may now download your approved set of plans by following the steps below. Be sure to print a copy of your approved plans to scale for the job site.

PRINT APPROVED PLAN SET

After final payment is made, you will receive an email indicating that your plans are approved and that you may access your approved drawings and documents in the **Approved folder in ePlan**.

1. To download the entire folder, select the box at the top of the thumbnails.
2. Uncheck any pages that you do not want to download.
3. When your selection is complete, click on the download icon. You may download one file at a time or all at once. If a group of files are larger than 10MB in size, it will automatically download all files in a .ZIP file.

Please provide a scale set of approved plans on the jobsite.

Thank you! The City of Minneapolis values your business.